

## Appendix D: Model Language for Resource Management Request for Proposal (RFP)—Commercial /Industrial Sector



*This appendix presents model language to help you develop your RFP for RM services. It provides key RFP components and a format to successfully solicit RM services.*

*The model RFP is just an example, however, it will not cover all conditions and circumstances. It is suitable for use in most commercial, industrial, and institutional settings. The suggested language should be considered a point of departure to begin building your own tailored RFP. You will likely need to make some modifications to suit your specific organization's needs and situation.*

*For each section and subsection, normal font text is our suggested model language, while italicized text represents our comments or guidance on what should generally be included in a section, and/or its relevance to the overall RFP process.*

*References to "Attachments" are documents in the main text of the RFP to: 1) provide supplementary guidance to bidders, and 2) request more information (references, general information, RM compensation tables). These should not be confused with the Appendices to this RM manual.*

## Appendix D: Model Language for RM RFP

### Date

**To:** Prospective Bidders

**Subject:** Request for Proposals (RFP): Resource Management Services for X Company

X Company requests interested and qualified firms to submit offers in response to this RFP seeking resource management (RM) services for its *[number and location]* facilities.

X Company feels there is opportunity to improve its resource efficiency by reducing waste generation, beneficially reusing materials, and increasing recycling of materials currently disposed of as waste. X Company wishes to enter into a multi-year partnership with the right provider to drive, implement, and manage these efforts. The purpose of this RFP, therefore, is to obtain the expert management services of an RM contractor (henceforth “Contractor”) to eliminate, reduce, re-use and recycle materials as well as (as a last resort) dispose of all wastes generated at our company. Further information on resource management can be found in Attachment I to the RFP and at the EPA’s WasteWise Website at <[www.epa.gov/wastewise/wrr/rm.htm](http://www.epa.gov/wastewise/wrr/rm.htm)>. The program will include economic incentives for the Contractor to divert materials currently going to the landfill and incinerator, or otherwise reduce waste generation.

This RFP seeks bidders who are committed to proactively partnering with X Company to ensure the application of best practice to increase overall resource efficiency at X Company’s facilities. We seek a proven, high-performing contractor with management and technical staff and significant corporate commitment to achieve the RM objectives detailed in *[section reference]* of this RFP.

This letter provides a summary of the salient elements of the RFP. Bidders are cautioned to carefully examine the entire RFP and the requirements contained therein before responding.

The following are key milestones for this solicitation:

- Bidders intending to propose must fax Attachment B - “Statement of Receipt, Authority, and Intent to Propose” to the X Company primary contact by *[date/time]*.
- A pre-bid conference (required) will take place on *[date]* from *[time period]*, beginning at *[location]*. After the meeting, tours of the facilities will be provided.
- Questions and clarifications to the RFP must be submitted by *[date/time]*.
- Proposals are due on *[date/time]*.
- The contract is expected to be awarded by *[date]*.

Bidders are encouraged to submit questions and clarifications pertaining to the RFP (by e-mail to the primary contact) as soon after its release as possible to allow us time to respond as fully as possible.

Proposals will be evaluated on the basis of the evaluation criteria listed in *[section reference]* of the RFP. The highest rated, competitive bidders may be required to make presentations to X Company sometime in *[date range]* for clarification or expansion on specific portions of their proposals. X Company will subsequently select the firm that offers the best overall value to X Company considering their response to the RM requirements and evaluated approach to optimizing total system-wide resource efficiency to achieve environmental gains and share cost-savings. X Company reserves the right to hold discussions with bidders that are the most competitive, or to reject any or all bids. The contract will be for a base period of *[length of intended base contract]* years with *[number and length, e.g., 2 one-year]* year extension options contingent X Company’s satisfaction with the chosen contractor’s RM program.

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The RFP contains the following sections:

- **Section 1: Introduction** - Organizational background, goals/objectives for RM program
- **Section 2: Bid Instructions** - Provides required content and format for proposals, schedule, evaluation criteria, and other “ground rules” for the solicitation process.
- **Section 3: Scope of Services** - General requirements and terms for the contract (i.e., services requested, terms, locations, supplier capabilities and other requirements).
- **Section 4: RM Requirements** - Provides the requirements bidders’ proposed RM services must meet, and provides the format “template” that must be followed in preparing their narrative responses.
- **Section 5: General Specifications** - The initial business terms that must be agreed to by the successful bidder.
- **Section 6: Pricing** - Gives instructions on how to provide bids for the base financial proposal and guidelines for proposals on the required resource management compensation structure. (Attachment C provides the template and further instructions for pricing.)
- **Attachments A-I** - Supporting information and several reference and authorization forms that must be returned and completed by bidders for their proposals to be considered responsive.

X Company has provided bidders the opportunity to propose their own approach to certain elements of contract compensation, including gain-sharing of documented cost savings from diversion and waste reduction initiatives. The objective is to provide bidders the flexibility to innovate and distinguish themselves while meeting our requirements.

All communications for submittal of questions and proposal correction or withdrawal prior to the closing date should be made via **e-mail** to the primary contact:

Name: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Address: \_\_\_\_\_

We hope you will choose to submit a proposal to provide RM services at X Company’s facilities, and look forward to seeing you at the pre-bid conference!

Sincerely,

Signatory

**“X” COMPANY**

**REQUEST FOR PROPOSAL (RFP):  
RESOURCE MANAGEMENT SERVICES**

Issued by:  
X Company

Date Issued:  
[Date]

Response Deadline:  
[Date]

Information included in this RFP, including information subsequently released by X Company during the RFP process, is strictly confidential, and may not be used for any purpose other than responding to this RFP, and may not be disclosed to any third parties without the prior written consent of X Company.

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### 1.0 INTRODUCTION

This section provides information on X Company, the purpose and objectives of this solicitation and the resource management program, and an overview of the current waste management and recycling program at the X Company facilities included in this RFP. *This section provides bidders an introduction to your organization and your purpose for the RM contract on which they are bidding.*

### 1.1 Organizational Background

*This section should present information that you feel is relevant to the providing bidders with a solid overview of your organization, its purpose, geographical location, key clientele and partners, size, and environmental/social/business ethic as rationale for pursuing an RM partnership. Much of this information can be gathered and condensed from your general business communications or marketing materials. Information that you should consider might include (but is not limited to):*

- *Business sector/mission/purpose*
- *Brief organization structure (if there are multiple operating entities, for example)*
- *General operating area/region, and extent/scope of RFP (# facilities included)*

*(Note: Detailed facility information, if there are multiple facilities, may go in an attachment, which you may wish to reference in this section)*

- *Number of employees*
- *Facility square footage*
- *Other size indicators (\$ revenue, etc.)*
- *Other general information that distinguishes your organization and would provide bidders a better understanding of your operating environment*

*Not all of this information may be available or relevant. This section should generally be less than one page in length.*

### 1.2 RM Program Purpose

The purpose of X Company's RM program is to obtain the expert management services of an RM contractor (henceforth "Contractor") to eliminate, reduce, re-use and recycle materials as well as (as a last resort) dispose of all wastes generated at X Company's properties/facilities/other. Further information on resource management can be found in Attachment I. The program will include an economic incentive for the Contractor to divert materials currently going to the landfill, or otherwise reduce waste generation. This initiative is a strategic sourcing partnership in which X Company wishes to collaborate closely with the selected Contractor to meet X Company's goals while creating value for both parties through savings from improved resource efficiency. It is intended that the successful bidder will be the driving force behind increased diversion, working in partnership with X Company's employees and contractors. Further, the chosen RM contractor will perform its work in the spirit of X Company's environmental policy (see Attachment F).

*If there are other specific purposes for your organization's RM program, please add these here as text or bullet items.*

### 1.3 RM Program Objectives

The Contractor's program shall meet the following objectives:

1. Pursue continuous improvement in resource efficiency (waste reduction, reuse, recycling/composting), and with X Company's approval, take a lead role in identifying, designing, and implementing innovative, cost-effective means to reduce waste generation and increase diversion at X Company's facilities.
2. Optimize current hauling, garbage disposal, and recycling operations and services to reduce overall waste management system costs.
3. Develop a detailed tracking, reporting, and billing/invoicing system to support X Company's goal setting, performance tracking, and decision-making ability.
4. Collaborate with X Company's staff to implement the RM program. This includes conducting educational training and outreach as necessary on aspects of the RM program, including but not limited to, recycling procedures or waste minimization.

### 1.4 Overview of Current Solid Waste Management at X Company

*This section provides bidders with a concise but comprehensive description of "material flow" and waste/recycling/composting processes within your organization. This should include, at a minimum, the following information:*

- *Identification of operations/areas/processes that generate different types of waste (e.g., kitchens generate over X% of our corrugated cardboard and organic wastes).*
- *Identification of key internal or contracted labor that handle/transport/separate waste internally (e.g., internal/contracted custodial, specific types of employees, all employees).*
- *System to separate and transport from point of generation to loading dock to contractor vehicle.*
- *Identification of materials that are currently recycled, and amounts (volume or tonnage, with tonnage the preference) identified for one or more recent years.*
- *Identification of tonnage disposed of in one or more recent years.*
- *Service levels for all contracts (all recycled, disposed streams to be included in the scope of RM contract) - this includes rented container/compactors numbers and volume, pick-up status (given schedule, such as 5x per week on 35-yd compactor, or state "as needed" if your service is on an "on call" basis), and details on any other waste/recycling services for which you incur costs, such as shredding/confidential services, etc. (see Table A1 of Attachment A).*



- *The nature of annual generation (i.e., identify fairly constant streams and those that are more sporadic, such as end of year clean out in a university setting). As noted in Chapter 4 of this manual, it is best to leave the sporadic waste streams out of the base scope of work. The sporadic waste stream can always be rolled into the RM program as “additional service” per Section 3.5 of this RFP.*
- *Estimated diversion rate (including recycling and any composting programs).*
- *Particularly successful or planned recycling programs, or areas for improvement or programs that you have been thinking about (e.g., recycling/reusing fly ash, initiating reusable containers program) and would like help implementing.*
- *Any operational issues that may affect program, such as planned renovations/ construction projects, or other potential constraints.*
- *Any other details that will allow bidders to get a better sense of your current programs and services.*

*You should also have a statement pointing to an attachment that you will put together detailing all volumes/tonnages and service levels, such as: “Attachment A provides X Company’s solid waste and recycling volume estimated for [most recent year] and the current waste/recycling service levels.” As a general rule, it is to your advantage not to disclose current rates or costs of services.*

### 2.0 BID INSTRUCTIONS

The following section provides instructions for preparation of bid materials that must be followed if a bidder is to be considered responsive. The information in this section should be considered the “ground rules” for the solicitation process and is intended to assist you in preparing your proposal.

*The section that follows is intended to provide general terms that should be followed, and as indicated above, delineates the general procedures and conditions for the solicitation. The most critical components of this section are the required proposal components and format (2.4), and the evaluation criteria (2.6). These 2 sections can also go in its own stand-alone section to call out its importance. In addition to those paragraphs presented here, your procurement office may have additional standard instructions that might need to be included.*

#### 2.1 Statement of Receipt, Authority, and Intent to Propose

All bidders must submit a Statement of Receipt, Authority, and Intent to Propose (Attachment B) **via fax** to the X Company primary contact, [name], (see Section 2.3) on or before [time and time zone], [date], [year]. Failure to return an executed Attachment B by this date will disqualify the prospective provider.

*This gives bidders the first requirement up front to complete the relevant attachment and return by a specific date. The form allows you to ascertain the number of companies that will bid, the number declined, and provides a single point of contact for each bidder for all communications. The form is also a type of solicitation contract that has each party sign off on certain conditions, such as confidentiality, independent preparation of*

*proposals (ensuring open competition and eliminating potential for collusion), and certification that the signatory has the authority to make a binding proposal on behalf of his/her company.*

### 2.2 Pre-bid Conference and Facility Tours

A pre-bid conference and tours of the facilities included in this RFP will be held at [location] on [date], [year] from [time] to [time]. **Bidders who intend to submit a response are required to attend the pre-bid meeting and tours.** Bidders should also provide, on the “Statement of Receipt, Authority, and Intent to Propose” form (Attachment B and see Section 2.1), the names and contact information of all persons from your company who are planning to attend the conference and tour. Please limit the number of people attending from your company to three (3).

The preliminary agenda includes:

- Overview presentation by X Company explaining purpose of RM and operational overview
- Q&A by bidders
- Facility (or facilities) tour (*one consideration is whether you will provide transportation for bidders if the tour is of multiple facilities in a locale/region*)

### 2.3 Queries and Primary Contact Person

All inquiries about this RFP must be made in written form, via e-mail, to the X Company primary contact:

Name: [name]

E-mail: [e-mail]

Fax: [area code + fax]

Address: [regular mailing address]

In the interest of fairness and the best program outcome, any questions and responses will be distributed via e-mail to all prospective providers who have indicated an intent to submit a proposal. The identity of companies who submitted questions will be kept confidential. All questions must be received by [date], [year], before [time]. Responses to all questions will be issued to all providers by X Company on [date], [year], before [time].

### 2.4 Proposal Required Contents and Format

At a minimum, each base proposal should address all of X Company’s requirements in two volumes:

1. A narrative response specifying a preliminary operations plan for an RM program that addresses services requested in Sections 3 (Scope of Services) and 4 (RM Requirements)

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while taking into consideration service levels in Attachment A. (Please note that the submitted response must follow the same headings provided in Section 4).

2. A base proposal and proposal for RM compensation in accordance with Section 6 (Pricing) and Attachment C (Bid Response Forms).

You should also bear in mind the proposal evaluation criteria outlined in Section 2.6 in preparing your responses. **Complete responses must be received via 1) e-mail and 2) mail/courier no later than [time, time zone] on [date], [year], to the primary contact noted in Section 2.3. Proposals received after the time and date specified above will be declined.** A complete proposal for this RFP should contain two (2) hard copies printed on 100% recycled paper with at least 50% post-consumer recycled fiber content. All bidders are also requested to submit an electronic copy of a complete response as Microsoft Word® (*or other required format*) documents via e-mail by the above date and time.

Bidders should respond to the points raised as directly as possible. Proposals that are incomplete, not properly endorsed, do not follow the requested format, or otherwise are contrary to the guidelines of this RFP may be rejected as non-responsive.

### 2.5 Proposal Schedule

The following timeline will be used for this selection process. (*If you choose to add times for milestone deliverables, be sure to specify appropriate time zone*).

DATE	ACTION
[Date], [Year]	RFP released to prospective providers via e-mail/fax
[Date], [Year]	Pre-bid conference and facility tours, [time] to [time]
[Date], [Year]	Submission deadline for questions on RFP to X Company primary contact, by [time]
[Date], [Year]	Summary of responses to all provider questions e-mailed to all providers, by [time]
[Date], [Year]	RFP responses due, by [time]
[Date], [Year]	The winning bidder is notified
[Date], [Year]	Contract development, definitive terms and conditions are negotiated. Transition start date is decided
[Date], [Year]	Estimated program implementation/start date

### 2.6 Response Evaluation Criteria

The evaluation criteria for RM responses include the following: *(criteria are not in order of ranking or weighting, although you may wish to do so and assign approximate percentage to each)*

1. Proposal Presentation
  - Thoroughness/completeness of proposal
  - Clarity and adherence to format
2. Bidder's Qualifications
  - Overall company quality in terms of reputation, financial strength, continuity of management, and ability to support indemnification and performance guarantees
  - Corporate experience and performance in waste reduction, and management of contracts of similar size and nature
  - Product quality offered, customer focused processes
3. Technical/Service
  - Ability to meet X Company's RM requirements (per Sections 3, 4)
  - Proposed approach to transition that minimizes impact on facility operations, overcome barriers, and quickly launches RM program
  - Service capabilities and responsiveness
    - Supply chain management
    - Source capabilities/Tier I integration (ability to source and manage any sub-contractors)
    - Environmental health & safety experience and record with respect to applicable regulatory programs
    - Customer communications
    - Technical staff qualifications
  - Ability to provide continuous, value-added strategic services to achieve goals
  - Ability to facilitate continuous reduction in waste generation and increase diversion
4. Management
  - Management leadership
5. Financial Benefit
  - Demonstrated price/cost reductions for total waste management system

X Company intends to award a negotiated contract to one firm to provide the services required under the terms and conditions it considers to be most favorable among those offered. Lowest price will not be the sole determining factor in awarding the contract, but rather X Company may award to the bidder whose proposal, in our opinion, represents the **lowest and best value bid**. The winning bidder should demonstrate how it can provide the best level of service in relation to cost. For example, the bidder will have the ability to handle the full variety of resource management requirements, a reputation of providing exceptional service, a good financial condition, experienced management, reliability, demonstrated experience in comparable operations, a good

safety record, a high level of compliance with all relevant regulations, and a record of strong support for recycling, composting and waste prevention efforts.

*The above list of evaluation criteria is not exhaustive and your organization, from its past contracting experience, may have additional factors that it wishes to consider. These can be added as necessary.*

### **2.7 Proposal Correction or Withdrawal of Proposal Prior to Closing Date**

Any proposal may be withdrawn or modified by written request of the bidder provided such request is e-mailed to X Company by the deadline stipulated in Section 2.4. Modifications received after the due date will not be allowed. Each correction to your proposal must be clearly marked and initialed by the bidder. X Company or its representatives reserves the right at any time to request clarification from any or all bidders submitting a proposal.

### **2.8 Additional Information, Investigation and Inspection**

X Company reserves the right to request site visits to one or more of the bidder's existing customer facilities, to speak directly to a provider's references, and to make independent investigations as to the qualification of any bidder at anytime during the process. Performance information may be solicited from any available source. X Company may request additional information by suppliers to clarify elements of their bid proposals. X Company will notify companies after all bids are received on whether a presentation is required.

### **2.9 Confidentiality of X Company Information**

The terms of this RFP, and all other information provided, are to be treated by your company as strictly confidential and proprietary. All data and business information is to be used solely for the purpose of responding to this inquiry. Access to this information shall not be granted to third parties except upon prior written consent of X Company and upon the written agreement of the intended recipient to treat the same as confidential. No news releases, public announcements or any other references to this proposal shall be made without the prior written consent of X Company. We may request at any time that any of our material be returned.

Should there be a breach of this request for confidentiality or other restrictions identified in this RFP, the bidder will be eliminated from consideration for this RFP.

### **2.10 Confidentiality of Proposals**

All proposal materials shall become the property of X Company and will be held confidential. Any copies of submitted proposals will be limited to X Company employees and consultants on a need-to-know basis. No proposals or associated documentation will be returned.

### **2.11 Responsibility for Costs**

X Company will not reimburse any bidder for any costs involved in the preparation and submission of the proposals, in making an oral presentation, or in contract negotiations. Bidders are responsible for all costs associated with responding to and submitting a proposal as part of this solicitation process.

### 2.12 Non-Standard Proposal Submissions

While we recognize that this RFP may request that you describe your business in ways that are different than your normal business practice, we nonetheless require that proposals be submitted in accordance with the instructions contained in this RFP. Suppliers are cautioned that proposals must follow the required format as outlined in this section, Section 4 (RM Requirements), and Attachments B through E.

### 2.13 Reservations and Limitations

X Company reserves the following rights and options:

- To reject any and all proposals that fail to meet the literal and exact requirements of the specifications provided in this RFP document
- To accept the proposal that is, in the judgment of X Company, in the best interest of X Company and its facilities
- To reject any and all non-responsive proposals
- To waive irregularities in any proposal as X Company may elect to waive
- To reject all proposals without cause
- To issue subsequent requests for new proposals
- To discontinue its negotiations after commencing negotiations with a finalist, if progress is unsatisfactory, and commence discussions with another bidder

### 3.0 SCOPE OF SERVICES

This section provides a general description of the scope of services sought, period of performance, locations of service, and other issues pertaining to providing RM services. The minimum RM elements that should be considered in bidders' narrative proposals are further detailed in Section 4.

*This section lays out the basic understanding for what services are requested, period and place(s) of performance, and considerations including additional work and sub-contractor relationships.*

### 3.1 General

The Contractor will be required to expertly manage all wastes generated by X Company at the facility/facilities enumerated in Attachment A according to the following hierarchy: (1) reduce generation of discards<sup>1</sup>, (2) reuse/return/donate<sup>2</sup>, (3) recycle/compost, and (4) dispose. Services required of the successful bidder include the following:

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<sup>1</sup> This includes any mutually agreed upon material that is deemed "waste," recyclables/compost, or surplus. The emphasis is limiting materials that need to be managed as outputs.

<sup>2</sup> This may include, for example, internal reuse programs, working with suppliers on return/takeback arrangements, or donating surplus materials to charitable organizations.

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- Provide containers, collection, pick-up, transportation, segregation, specific processing, shipment and marketing of discarded materials;
- Development and implementation of plans for the reduction, reuse, recycle and/or final disposal of all waste materials generated by X Company's facility/facilities with X Company's approval;
- Oversight and coordination of on-site source separation;
- Training for X Company staff and limited X Company contractors;
- Performance monitoring, data tracking, and comprehensive reporting;
- Consolidated billings for applicable facilities at required level of detail;
- Participation in X Company RM team meetings as required;
- The successful bidder shall also—with X Company's assistance—develop, maintain and follow work instructions, safety rules, and established policies & procedures as they apply to non-hazardous and hazardous waste management activities.

Bidders shall submit, as the main portion of the narrative proposal, a three (3) year Operations Plan per Section 4.3 that details the approach and methods for achieving the stated purpose and objectives of the resource management Program while managing wastes according to the hierarchy given in Section 3.1. The remainder of the narrative proposal will cover other critical elements of the program as enumerated above and detailed in Section 4.

Upon negotiation and mutual agreement at a later date, additional materials, including universal wastes, may be added to the scope of services.

### 3.2 Period of Performance

X Company is looking for a strategic long-term partner and understands many resource efficiency initiatives will take time to develop a comprehensive program. As such, this contract will be awarded for a minimum period of [*# of years of base contract*] with [*# of years for renewal option*] one-year renewal options. The initial three-year period is a commitment to work with the contractor on the RM program, after which the program may be extended for a maximum of four one-year periods if the program is successful and meets X Company's expectations.

*Note: As the success of an RM program rely on a established strategic partnership, we recommend the base contract length be no less than 3 years.*

### 3.3 Supplier Capabilities

It is understood that the primary supplier responding to this request for proposal may not have the capability to undertake all the tasks outlined. The successful candidate may develop cooperative agreements with subcontractors in order to provide and manage the full scope of services requested by X Company. Detailed information on these collaborations must be submitted as part of the original proposal (see Section 4.1).

### 3.4 Additional Services

From time to time the RM contractor may be asked to perform extra services not specified within this scope of work. This work will be reimbursed by X Company under a separate purchase order. This type of work may, at X Company's discretion, be competitively bid.

## 4.0 RM REQUIREMENTS

This section outlines minimum responsibilities and activities the Contractor will be required to perform. All narrative proposals should follow the headings below, and provide concise responses to the information requested. Bidders are expected to respond to all items in as much detail as necessary for X Company, its representatives and consultants to make a fair evaluation of your firm and the proposal for ranking.

*This section spells out the specific RM requirements that bidders will need to respond to in the narrative portion of their proposals.*

### 4.1 RM Program, Management, and Business Systems

Provide a brief description of your overall management and business systems as they pertain to the following:

- Describe your vision of an RM program for X Company.
- Identify your specific project personnel or teams that will be devoted to X Company's RM program. Include how staff devoted to X Company's RM program will interact or utilize overall company resources/expertise (include training they may receive or corporate resources or networks that will benefit X Company).
- Employee stability is essential to the programs success. What does your company do to maintain a stable workforce?
- Discuss the relationships that you plan to establish with X Company and each of its facilities included in this RFP. Include in your discussion, where applicable, the relationships you propose to establish with X Company staff and contractors or suppliers.
- Your response must identify any third parties with whom you will partner to provide the RM services requested in this RFP, including which elements you propose each third party will cover, and their credentials to provide these services.
- Complete Attachment D, "Supplier General Information."



## Appendix D: Model Language for RM RFP

### 4.2 Environment and Safety Issues

The RM contractor must comply with all applicable regulations (local, State, Federal) and X Company policies governing the recycling, storage, transportation and disposal of waste streams. Lack of knowledge of the bidder shall in no way be a cause for relief from responsibility or constitute a defense against the legal effects thereof.

- Describe your environmental and safety programs that apply to managing risks associated with the primary supplier function. Discuss the regulatory expertise of the staff members you propose to work for X Company.

### 4.3 Operations Plan

The RM shall provide a preliminary 3-year plan that outlines the approach and methods for achieving the purpose and objectives of RM in Sections 1.2 and 1.3 and the management of wastes per the management hierarchy in Section 3.1. X Company understands that data in this RFP is limited and that the successful bidder will refine their plan as they become more familiar with individual facilities. The operations plan in the proposal should provide a methodology, labor, equipment, and concrete opportunities for improvement in managing X Company wastestreams. The proposal should also include an approach for program transition, a tentative schedule for implementing ideas proposed to meet the RM programs' goals, and prior experience rolling out these types of programs with other clients comparable to X Company.

Attachment A contains existing levels of service for the X Company facilities covered in this solicitation. Bidders can base their operations plan on existing levels of service and the facility tours to be conducted after the pre-bid conference.

The operations plan should specifically address how you propose to handle the management of wastes in areas below. The following paragraphs outline minimum expectations/responsibilities of successful bidders in each of the four areas:

#### 4.3.1 *Reduce Waste Generation*

- Identify all opportunities at each site to reduce the volume of waste generated with consent and collaboration of facility management.
- Work with designated X Company and designated personnel to develop plans and project savings.
- Obtain X Company approval for implementation.
- Implement and monitor outcomes and savings, and report metrics in writing to X Company on a quarterly basis.
- Educate and train X Company employees as needed on source reductions measures.

### 4.3.2 *Reuse/Return/Donate*

- Identify opportunities to eliminate waste being disposed of or landfilled by reusing or returning purchased materials (e.g., shipping containers or pallets) or packaging. This will involve working with X Company and operating company procurement/purchasing staff and their suppliers.
- Work with designated X Company and facility-designated personnel to develop plans and project savings.
- Obtain X Company approval for implementation.
- Implement and monitor outcomes and savings, and report metrics in writing to X Company on a quarterly basis.
- Educate and train X Company employees as needed on any instituted reuse/return programs.

### 4.3.3 *Recycle/Compost*

- Develop plans to source separate, collect, process, segregate, store, weigh, and keep records for all recyclable materials diverted from X Company waste streams.
- Identify the best markets for recycled materials and arrange for collection, processing and transportation of these resources.
- Identify opportunities to increase diversion through improvements to existing recycling programs and new recycling or composting programs.
- Current recycling programs include (*list all programs here, including any composting*). The successful RM contractor will be expected to expand and improve these programs, while adding additional materials for recovery where practicable.
- Design and implement effective source separation and recycling programs while decreasing overall operational costs.
- The volume, weight, frequency of pickup, and revenue from recycled materials, tonnage and all other relevant metrics must be reported to X Company on a quarterly basis.
- The Contractor will be required to maintain third-party receipts, for the duration of the contract, showing weights of materials sold, resulting costs and revenues. X Company maintains the right to review all such documentation, within one working day of its request, at any time during the contract.
- Educate and train X Company employees as needed on proper compost procedures, segregation of recyclables/waste, and effects of recyclable contamination.

### 4.3.4 *Waste Disposal*

- Arrange pick-up schedule, transportation, and disposal of all non-recyclables from X Company's facilities.

- Measure X Company's waste destined for off-site facilities, maintain accurate records of each pickup's weights and volumes, and provide cost breakout for transportation and disposal fees (and any container rental fees if applicable) with each bill.
- Review, modify, maintain or establish all necessary waste management practices which provide contractor and X Company with understandable and controllable work instructions.
- Comply with all applicable regulations and X Company's policies governing the recycling, storage, transportation, and disposal of trash.
- Report in writing, the tonnage, costs, and disposal site(s) of all X Company waste, and implement and monitor outcomes and savings, and report metrics in writing to X Company on a quarterly basis.
- The Contractor will be required to maintain third-party receipts, for the duration of the contract, showing weights of materials disposed and tip fees, and X Company maintains the right to review all such documentation.

#### 4.3.5 *Process for Continuous Improvement*

- Explain your process to provide continuous improvement over the term of the contract (audits, outreach and communications, etc).

#### 4.4 **Waste Composition**

- Describe the approach you will use to measure or estimate the composition of X Company waste streams.
- Identify your data information management tools that will be used to track X Company waste streams.

#### 4.5 **Billing**

- The contractor shall provide monthly billing statements to X Company with all hauling costs separate from secondary material processing, recycling revenues/fees, or waste disposal tip fees. Propose line items you envision that meet the above requirements for cost transparency.
- Present your procedures for billing and allocation of costs (from pick-up to bill).

#### 4.6 **Reporting and Performance Review**

The selected RM contractor will provide a comprehensive quarterly report that includes all activities related to recycling and waste minimization efforts including costs, metrics, service levels, etc., and that provides visibility into waste minimization/recycling progress, performance, and costs/savings. With this in mind:

- Discuss what should be included in quarterly progress reports to X Company.
- Discuss your approach for validating cost savings and increased diversion.
- Identify the performance metrics you will employ and your procedures for formally, both internally and with the X Company, reviewing and assessing your performance.

The specific reporting elements will be mutually determined during the implementation phase and adjusted as necessary throughout the contract. It is anticipated that the successful bidder will generate a draft quarterly report after the first 3 months of the program. In this first report, the RM contractor will note specific data deficiencies that may prevent its ability to report data by facility and by waste stream as agreed upon, and propose how these deficiencies can be overcome. It is anticipated the second report, after month 6 of the program, will be fairly complete and establish the format for subsequent reports.

As noted in the above sections, the successful RM contractor will be required to maintain third-party receipts, for the duration of the contract, showing volume and weights of materials disposed/recycled and any revenues/tip fees. X Company maintains the right to review all such documentation at its premises within one working day of request.

The resource management Team at X Company and the RM contractor shall meet on a regular basis (at least quarterly) to discuss progress, status, and performance of services. The successful bidder will be largely responsible for spearheading and facilitating these meetings.

- Discuss what issues you expect to cover in these meetings and a proposed format.

#### **4.7 Bidder's References**

- List three of your current major customers and provide the information requested in Attachment E. Include as many customers as possible that are comparable to X Company's requirements insofar as size and resource management requirements are concerned.

#### **5.0 GENERAL SPECIFICATIONS**

These are the general terms and conditions that will be included in the contract if a successful bidder is chosen. The terms and conditions in the final contract will not be limited to those below, but may include additional standard contractual terms and conditions.

*Note: This section should not be lengthy, and you might even choose to exclude this section altogether and only include all specific terms and conditions in the contract. The purpose of this section is to give bidders advanced notice on some of the major specifications, most of which they should be familiar with. Once again, the content is heavily dictated by your organization's contracting experience and specific needs, especially with respect to insurance or other sensitive issues.*

### 5.1 Equipment

The Contractor shall furnish all the labor and supervision, tools, machinery and equipment to perform the work outlined in these specifications, unless otherwise indicated.

### 5.2 Subcontracting

The Contractor has full responsibility for: the coordination of the Subcontractor's work, including control of the quality, compliance with all federal, state, and local regulations and ordinances, and fulfillment of schedules. X Company reserves the right to reject any sub-contractor.

### 5.3 Third-Party Indemnification

The Contractor shall indemnify and hold harmless X Company and their agents and employees from and against all claims, damages, losses and expenses including attorney's fees arising out of or resulting from the performance of the work, provided any such claim, damage, loss or expense (1) is attributable to bodily injury, sickness, disease, or death or to injury to or destruction of tangible property, and (2) is caused in whole or in part by any negligent act or omission of the Contractor, any subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder. In any and all claims against X Company or any of their agents or employees by any employee of the Contractor, any subcontractor, or anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable; the indemnification obligation under this paragraph shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the Contractor or any subcontractor under Workmen's Compensation Acts, disability benefits acts, or other employee benefits acts.

### 5.4 Insurance

The Contractor shall purchase and maintain such insurance as will protect them from claims under Workmen's Compensation Acts and other employee benefits Acts, including but not limited to, from claims or damages because of bodily injury, including death, and from claims or damages to property which may arise out of or result from the Contractor's operation under this contract, whether such operation be by themselves or by any subcontractor or anyone directly or indirectly employed by any of them. The insurance shall be written for not less than any limits of liability specified as part of this contract, or required by law, whichever is greater.

### 5.5 Performance Bond

A performance bond and also a labor and materials or payment bond and a lien bond, with a surety company qualified to do business under the laws of [*the state where your facilities are located*] and satisfactory to X Company each in the penal sum to 100% of the contract amount, may be required of the successful bidder.

### 5.6 Health and Safety Considerations

The Contractor shall take all reasonable precautions in the performance of the work under this contract to protect the health and safety of employees and of members of the public, and to minimize the danger from all

hazards to life and property. The Contractor will be responsible for supervising all its personnel to insure that the provisions of the Occupational Safety and Health Act of 1970 are being complied with, especially OSHA Standard for Machinery and Machine Guarding, 29 CFR 1910.212, 1984, and OSHA Standard for Personal Protective Equipment, 29 CFR 1910.132-136, 1994. In the event that the Contractor fails to comply with said regulations, X Company may without prejudice to any other legal or contractual rights, issue an order stopping all or any part of the work; thereafter a start order for resumption of work may be issued at the discretion of X Company. The Contractor shall make no claim for compensation or damages by reason of or in connection with such work stoppage.

### **5.7 Nondiscrimination and Sexual Harassment Issues**

The Contractor agrees to post in a conspicuous place available to employees and applicants for employment, notices setting forth the provisions of the nondiscrimination clause in the contract. The Contractor shall also periodically train all drivers and other service personnel serving X Company on awareness and prevention of sexual harassment.

### **5.8 Termination**

X Company reserves the right to terminate this contract, or any part thereof, on 30 days written notice if, in X Company's sole judgment, which shall be final, such action seems justified.

## **6.0 PRICING**

This section outlines the guidelines for preparing your quote for RM services at X Company. In addition to the narrative proposal outlining your RM program (see Section 2.4), you should prepare your quote for the requested services over a 3-year period (*note: the base contract length*). Consistent with the goals of the RM program, quantities of waste currently disposed are expected to decrease over this three-year period. X Company has divided requested services to be bid in two sections: 1) a base financial proposal, and 2) a resource management compensation structure.

### **6.1 General**

X Company recognizes that any supplier will provide on-site services for whatever level of services the buyer chooses to purchase. X Company also recognizes that the typical approach in the marketplace to providing these services is to charge a management fee in addition to the cost of hauling and disposal. This is not the type of approach X Company desires. Rather, X Company is prepared to make an extraordinary commitment to the right partner(s) and develop a compensation structure that is tied directly to contractor performance allowing the successful partner(s) to share in the savings achieved under this program. This rewards the successful partner(s) for bringing technical expertise, process discipline, best industry practices, new technologies, metrics and industry talent to implement a successful program.

X Company will only consider responses that meet all of the requirements for the RM program (see Section 4), and is consistent with program objectives (see Section 1). X Company seeks an RM provider who can achieve favorable pricing on waste and recycling, and provide a range of additional resource management

services. To successfully meet its goals, X Company is prepared to develop a strategic partnership with a provider over a minimum [*initial contract length*] year period.

### **6.2 Base Financial Proposal**

X Company is seeking a supplier that can achieve competitive pricing on existing waste and recycling services to all of its facilities. Part of the base proposal must include the billing, reporting and data management requirements as defined in Sections 4.5 and 4.6 of this RFP.

The base proposal must consist of two components: a bid for hauling, recycling, and disposal services and an estimate of revenues or costs associated with existing recycling levels. In short, the base proposal should reflect the price to overtake the existing levels of service as detailed in Attachment A. Bidders must submit a base proposal in the format of Attachment C to this RFP (Tables C-I and C-II) and be prepared to break out costs by facility if requested.

#### **6.2.1 Disposal**

- Separate costs for hauling and disposal must be submitted.
- There are to be no volume guarantees on behalf of X Company. The objective of the program is to decrease the amount of waste sent to the landfill.
- Costs must be broken out by facility.

#### **6.2.2 Recycling**

- Hauling and processing costs must be separate.
- Provide revenue estimates or costs for secondary commodities for the materials listed in Attachment C, Table C-II.
- X Company is open to innovative structures such that X Company and the successful bidder share in the benefits of recycling during high commodity markets and share the risk during low markets.

### **6.3 Proposals for Resource Management Compensation**

The goal of the RM program is to allow the successful bidder to profit from helping X Company achieve cost effective diversion and waste reduction. X Company understands the successful bidder will incur costs to provide RM related services. Instead of proposing additional fees for these services, the successful bidder is expected to propose a means to cover any recurring expenses, along with its profit margin, from overall RM program savings. You may also choose to propose a cost recovery mechanism for start-up expenses (see Attachment G to this RFP). Your proposal for resource management compensation that will provide you with an incentive for waste reduction, efficiency, and service enhancement should be completed following Attachment C, Bid Section C-III.

Savings may come from avoided landfill disposal costs, reduced hauling fees, increased recycling revenues or the elimination of a waste stream altogether, or any other documented cost savings. Overall program savings

## Appendix D: Model Language for RM RFP

### ATTACHMENT A: X COMPANY WASTE AND RECYCLING SERVICE LEVELS, 2001

The following two tables are sample template of waste and recycling volume and service levels.

**Table A1. Waste and Recycling Volume Estimated for 2001**

	Disposal *	Recycling *				
Facility	Trash (tons)	Cardboard (tons)	Newspaper (tons)	Mixed Office Paper (tons)	Plastics	Est. Recycling Rate (%)
Facility A	264	30	9.6	11.0	1.0	25%
Facility B	172	42	2	12	3	
Total	436	72	11.6	23	4	
Recycling Total		110.6 tons				

\* Hypothetical figures

**Table A2. Waste and Recycling Service Level**

Container Size and Collection Frequency					
	Disposal	Recycling			
Facility	Trash	Cardboard	Newspaper	Mixed Office	Bottles and Cans
Facility A	One 40-yd compactor; on-call service	Two 2-yd containers; 5 times weekly	Two 0.5-yd containers; once per week	One 2-yd container; once per week	Two 0.5-yd containers; once per week
Facility B	One 35-yd compactor; on-call service	Three 2-yd containers; once per week	One 0.5-yd containers; once per week	Two 0.5-yd containers; once per week	Two 1-yd containers; twice a month



must be documented against reductions in the baseline costs. Baseline savings can be achieved in a number of ways, including but not limited to:

- Increased recycling from existing programs through better education and outreach to X Company's employees.
- Stream lined logistics through optimization of container sizes and pick up schedules.
- Implementation of new recycling programs (new materials or new facilities).
- Working up stream with suppliers on packaging or returnable drum/pallet systems.
- Other diversion initiatives.

Within the first 6 months of the program, the successful bidder and X Company will establish a mutually agreed upon baseline. This baseline will be calculated based upon the negotiated prices as set forth in the base proposal and the existing levels of service as detailed in Attachment A, and will serve as the current level from which diversion levels and cost savings will be measured.

Attachment G outlines some **options** for different compensation elements that you may wish to consider for your proposal.

**ATTACHMENT B: STATEMENT OF RECEIPT, AUTHORITY AND INTENT TO PROPOSE FORM**

Please return your response to this attachment (this and following page) via fax to [name of contact] at [phone number] by no later than [time] on [date]. Detailed information on the pre-bid meeting (directions, agenda, etc.) will be sent [number of days] prior to the meeting.

**Authorization**

The individual submitting the Proposal represents and certifies as part of the Proposal that he/she is authorized to act as an agent for the company responsible for this Proposal.

**Confidentiality**

The information and data contained in this RFP is confidential and may not be discussed or disseminated to any third party without X Company's prior written permission. Company shall not disclose any information contained in or concerning this Request for Proposal, directly or indirectly, to any person or business entity except for a limited number of employees directly involved in preparing a response to this RFP. No news releases, public announcements or any other references to this proposal shall be made without the prior written consent of X Company.

**Independent Preparation of Proposal**

Any proposal submitted in response to the RFP will be developed independently, without consultation, communication, or agreement for the purpose of restricting competition, to any matter relating to costs or terms with any other respondent or any representative of such respondent.

**A. Statement of Receipt and Intent to Propose**

\_\_\_\_\_. Hereby acknowledge Receipt of RFP  
(Company)

\_\_\_\_\_ Print name

\_\_\_\_\_ Authorized Signature

\_\_\_\_\_ Title

\_\_\_\_\_ Date

Please **"BOLD"** one and delete the other **BEFORE RETURNING THIS PAGE.**

We plan to submit a proposal in response to the X Company RFP for resource management Services.  
(Please fill in Part B and C)

We do not plan to submit a proposal in response to the X Company RFP for resource management Services.

(Cont'd on next page)

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## Appendix D: Model Language for RM RFP

### B. Authority and Intent to Propose

Companies must designate one point of contact for all proposal communications. Each bidder is responsible for notifying X Company immediately of any change to such point of contact.

Name of Authorized Agent:	
Title of Authorized Agent:	
Company Represented:	
Signature of Authorized Agent:	
Date:	

RFP Contact:	
Contact Address:	
Contact E-mail:	
Contact Phone:	

### C. Representatives Attending Pre-bid Conference and Facility Tour

Number Attending Site Visits (max. 3)	
1. Name and title of attendee #1:	
Phone:	
E-mail Address:	
2. Name and title of attendee #2:	
Phone:	
E-mail Address:	
3. Name and title of attendee #3:	
Phone:	
E-mail Address:	

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**ATTACHMENT C: RFP BID RESPONSE FORMS**

**Bid Section C-I. Base Proposal - Waste and Recycling Service Cost**

*The following tables provide a template for bidders to follow. It forces them to disaggregate their pricing and make their bids “transparent”.*

Please provide your waste and recycling service costs for Contract Year 20XX based on the service level in Attachment A. You are also given space below the table to document any expected rate changes in subsequent contract years.

If this bid is accepted, the contract will in no way guarantee the successful bidder the current estimated tonnage or levels of service (see Attachment A) over the life of the contract. In fact, it is {X Company}'s intent with an RM program to increase diversion such that land filled tonnages and waste hauling service will decrease while recycling service will increase over the contract period.

**Waste Disposal Bid**

<b>Contract Year 20XX</b>			
	Unit cost	Estimated No. Units *	Sub-Total
Hauling (per pick-up, 35-yd compactor)	\$		\$
Hauling (per pick-up, 40-yd open box)	\$		\$
Add hauling for other containers per above rows	\$		\$
Disposal (per ton)	\$		\$
Other Costs ++ ( _____ )	\$		\$
<b>Estimated Total Waste Collection and Disposal Cost</b>			<b>\$(1)</b>

\* Base estimates on service level in baseline year (see Attachment A)

++ Specify the type of costs (e.g. container rental) in space given in table

**Indicate in the table below if you expect changes in Contract Years 2 and 3 to the rates bid for Contract Year 20XX.**

	Year 2	Year 3
Hauling rate change (container 1)		
Hauling rate change (container 2)		
Disposal Rate change		
Other cost change		

## Appendix D: Model Language for RM RFP

### Paper Recycling

Indicate the number and size of receiver containers (provide costs of containers, if any, in “Other Costs” portion of table below):

Contract Year 20XX			
	Unit cost	Estimated No. Units *	Sub-Total
Hauling (per pick-up)	\$		\$
Processing (per ton)	\$		\$
Other Costs ++ ( )	\$		\$
<b>Estimated Total Paper Recycling Cost</b>			<b>\$(3)</b>

\* Base estimates on service level in baseline year (see Attachment A)

++ Specify the type of costs (e.g. container rental) in space given in table

**Indicate in the table below if you expect changes in years 2 and 3 to the bids given for contract year 20XX.**

	Year 2	Year 3
Hauling rate change		
Disposal Rate change		
Other cost change		

*Note: The Paper Recycling table can be duplicated for other recyclable streams (corrugated cardboard, commingles containers, etc.) to provide a form for all current recycling services.)*

### Bid Section C-II. Resource Management Compensation

The request for a proposed RM compensation mechanism should remain fairly flexible. You might want to insert language like that below and provide examples to bidders on how they may choose to structure their compensation proposal in a separate attachment to your RFP, given in this sample RFP as Attachment G.

{X Company} intends to share documented savings that come from resource efficiency improvements proposed by the RM contractor, including but not limited to: avoided hauling cost, avoided disposal cost, commodity revenue or other cost savings the successful bidder can document. The bidder is required to propose a feasible and equitable contract mechanism outlining how cost savings will be shared for the three contract years. Provide required descriptive support and tables in this section.

Please see Attachment G for examples of potential compensation mechanisms. Bidders are encouraged to propose innovative, equitable compensation schemes. As per Section 5.3 of this RFP, the Contractor and {X Company} will establish a mutually agreed upon baseline in the first 6 months of the program.

Note: The successful bidder will be required to track and report savings that come from the RM program. The actual compensation mechanism for RM services will be negotiated and finalized during contract negotiation. (Attach additional pages as necessary)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Appendix D: Model Language for RM RFP

### ATTACHMENT D: SUPPLIER GENERAL INFORMATION

Please provide the information requested below.

Supplier name:	
Address:	
Phone:	
Fax:	
Hours/days of operation:	
Emergency operation hours/services:	

General company description:	
Years in business:	
Company Status (Public, Private, Subsidiary):	
2001 Revenue:	
Number of customers:	
Number of customers in the [geographical area, e.g., Northeast] US Region:	
Number of customers in the [x] industry:	
Number of employees:	
Number of employees in the [geographical area, e.g., Northeast] US Region:	
Number of employees servicing the [x] industry:	
Office locations:	
Provide a description of your client base:	
List parent company and/or subsidiaries:	

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## ATTACHMENT E: BIDDER REFERENCES

Provide the names, contact and other information of three current customers with similar facility management needs and organizational structure as X Company whom we may contact for references. By providing this information, you authorize X Company (or designated representative) to contact these customers.

<b>Customer Reference #1:</b>	
Company name	
Business type	
Contact person	
Title	
Phone	
E-mail	
Address	
Services provided	
Approximate contract value (\$) and/or tonnage managed	
Number of years as customer	
Waste minimization/recycling milestones	

<b>Customer Reference #2:</b>	
Company name	
Business type	
Contact person	
Title	
Phone	
E-mail	
Address	
Services provided	
Approximate contract value (\$) and/or tonnage managed	
Number of years as customer	
Waste minimization/recycling milestones	

<b>Customer Reference #3:</b>	
Company name	
Business type	
Contact person	
Title	
Phone	
E-mail	
Address	
Services provided	
Approximate contract value (\$) and/or tonnage managed	
Number of years as customer	
Waste minimization/recycling milestones	

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## **Appendix D: Model Language for RM RFP**

### **ATTACHMENT F: X COMPANY ENVIRONMENTAL POLICY**

[Insert your company's / organization's environmental policy.]

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### **ATTACHMENT G: RESOURCE MANAGEMENT COMPENSATION OPTIONS**

[See Appendix E of this RM manual.]

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### **ATTACHMENT H: FACILITY ADDRESSES AND LOCATION MAPS**

#### **i. Facility A**

[Map of Facility A]

[Address of Facility A]

#### **ii. Facility B**

[Map of Facility B]

[Address of Facility B]

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### **ATTACHMENT I: RESOURCE MANAGEMENT - STRATEGIC PARTNERSHIPS FOR RESOURCE EFFICIENCY**

[See enclosed Waste Wise Update.]

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